

# State Surveyor Information System (SSIS) 2.0 User Manual

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## Welcome to State Surveyor Information System 2.0

Welcome to the State Surveyor Information System 2.0 (SSIS). This system is provided by the Centers for Medicare and Medicaid Services (CMS) and the Centers for Disease Control and Prevention (CDC) in support of their Clinical Laboratory Improvement Amendments of 1988 (CLIA) mandated laboratory evaluation functions. The main purpose of this system is to provide State surveyors with information from the CMS Online Survey, Certification and Reporting (OSCAR) and proficiency testing (PT) monitoring databases to assist them in evaluating laboratory PT performance. It is also intended to provide demographic, inspection, and PT information for others interested in these data. The OSCAR data system is a national CMS database comprised of information entered by the State survey agencies for Medicare, Medicaid, and CLIA certification of health care facilities (The information on the SSIS is, however, limited to laboratories). OSCAR includes basic demographic (name, address, phone number, and type facility) and compliance (deficiency) information. The CLIA file includes information by laboratory category e.g., physician office, independent, hospital based, and blood bank, and by major specialties performed, e.g., chemistry, hematology, and microbiology. The PT records include information about laboratory enrollment, PT program, specialties, scores, pass/fail data, and reasons for not reporting. It is planned that individual test results and grading parameters will be provided in the future. Reports available on this system allow user to generate static, real-time reports by region and/or state. State surveyors have the ability to correct reported PT results when the results observed onsite do not match the results in the database. Additional information about CMS and CDC can be obtained from their respective Internet web sites, [www.cms.gov](http://www.cms.gov) and [www.cdc.gov](http://www.cdc.gov). These sites also have information about CLIA.

System provided by the Division of Laboratory Systems, CDC.

# Using SSIS 2.0

## SSIS Support

For general support, contact SSIS Support at [COWPROJECT@cms.hhs.gov](mailto:COWPROJECT@cms.hhs.gov).  
For technical support, contact Technical Support at [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov).

## Logging In

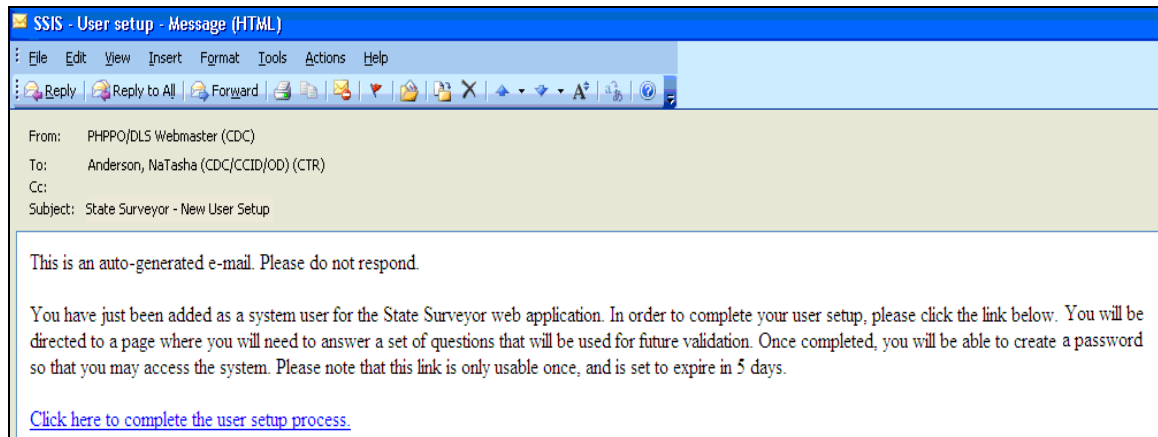


### NOTES:

- CDC system users:
  - Active CDC system users are **NOT** required to log in and out of the system, nor are they required to complete the user authentication process.
  - Active CDC system users will access the SSIS system via the CDC intranet and view the [Main Menu](#) page (see [Main Menu](#)).
- Non-CDC system users:
  - After three (3) unsuccessful log in attempts, your account will automatically be locked (see [Locked Accounts](#)).

## ❖ New User

If you are a new user, you can request a SSIS account by contacting SSIS support (see [SSIS Support](#)). Once you are added to the SSIS system, you will receive an email with a user authentication link (see [User Authentication](#)).



## ❖ User Authentication


Once you are added to the SSIS system, you will receive an email that includes a one-time use link that you will need to access in order to complete the user authentication process. This process requires that you select and answer five (5) questions; and set a password.



### NOTES:

- If the user authentication link that you received has expired and no longer works, contact SSIS Technical Support (see [SSIS Support](#)).
- Users who have locked accounts will be required to complete the user authentication process in order to re-activate their account.
- The responses to the authentication questions will be used to reset forgotten passwords.

- As an active user, you can change your authentication questions and/or responses at any time (see [Manage my Account](#))



## State Surveyor Information System

**SSIS Support**  
Email: [COWPROJECT@cms.hhs.gov](mailto:COWPROJECT@cms.hhs.gov)


**Technical Support**  
Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

You must answer 5 questions in order to proceed. These responses will be used to reset a forgotten password.

Select a question

SUBMIT

Save and Continue



## State Surveyor Information System

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**Technical Support**  
Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

You must answer 5 questions in order to proceed. These responses will be used to reset a forgotten password.


Select a question

SUBMIT

Selected Questions List

<a href="#">Remove</a>	What is the name of you first dog?
<a href="#">Remove</a>	What is your mother's maiden name?
<a href="#">Remove</a>	When did you graduate from highschool?
<a href="#">Remove</a>	Where did you go to college?
<a href="#">Remove</a>	What is the name of the town your mother was born?

Save and Continue



# State Surveyor Information System

**State Surveyor Information System - Password Setup**



**SSIS Support**  
Email: [COWPROJECT@cms.hhs.gov](mailto:COWPROJECT@cms.hhs.gov)

**Technical Support**  
Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)


- Create passwords with 8 characters or longer
- Use 3 of 4 character types: Uppercase, Lowercase, Numeric, or Special Character
- The password cannot contain your name, User Name or your e mail address
- Passwords must be changed at least every 60 days
- New passwords can not match any of your previous 10 passwords
- Don't share your passwords or write down where others can find it

Enter Password:

Re-enter Password:

Once you've successfully answered your authentication question and set your password, you can then enter your user name and password on the [Log In](#) page. Your user name is your email address and your password is the password you created during the authentication process.



# State Surveyor Information System

**State Surveyor Information System Login**



**SSIS Support**  
Email: [COWPROJECT@cms.hhs.gov](mailto:COWPROJECT@cms.hhs.gov)

**Technical Support**  
Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)


User Name:

Password:

[Click here if you have forgotten your password](#)

Upon successful login, the system will return the [Main Menu](#) page.



# State Surveyor Information System

State Surveyor

**Administration**

[Main Menu](#)

[Manage My Account](#)

**SSIS Support**

Email: [COWPROJECT@cms.hhs.gov](mailto:COWPROJECT@cms.hhs.gov)

**Technical Support**

Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

[Log Out](#)

**State Surveyor Information System - Main Menu**

Surveys

[Add New Survey](#)

[View My Incomplete Surveys \(2\)](#)

[Search and Locate Survey](#)

Laboratory Demographics

[View Laboratory Demographics](#)

Reports

[Completed Survey Count Report](#)



[Survey Actions Report](#)

[Survey Responses Report](#)

Resources


[SSIS User Manual](#)

[CMS Links](#)

## ❖ Returning User

If you are a returning SSIS user, enter your user name and password and click **Login** to return the [Main Menu](#) page.



# State Surveyor Information System

**State Surveyor Information System Login**

**SSIS Support**

Email: [COWPROJECT@cms.hhs.gov](mailto:COWPROJECT@cms.hhs.gov)



**Technical Support**

Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

User Name:

Password:

[Click here if you have forgotten your password](#)



## Logging Out

To **Log Out**, click **Log Out**, located on the left side of the screen, or close the browser, to return the [Log In](#) page where you may log in again.

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**State Surveyor Information System**

State Surveyor

**Administration**  
Main Menu  
Manage My Account

**SSIS Support**  
Email: COWPROJECT@cms.hhs.gov

**Technical Support**  
Email: SSISTechSupport@cdc.gov

**Log Out**

**State Surveyor Information System - Main Menu**

Surveys  
Add New Survey  
View My Incomplete Surveys (2)  
Search and Locate Survey

Laboratory Demographics  
View Laboratory Demographics

Reports  
Completed Survey Count Report  
Survey Actions Report  
Survey Responses Report

Resources  
SSIS User Manual  
CMS Links

**CDC**  
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## Passwords

General rules regarding passwords are as follows:

- Passwords must be 8 or more characters in length with at least three of four character types: uppercase, lowercase, numeric, and special character
- Passwords are case sensitive
- Passwords can not contain your name and/or email address
- Passwords will expire after 60 days and the system will prompt you to change your password 10 days in advance of the password expiration.
- New passwords can not match one of your previous 10 passwords
- Forgotten passwords will require a new password to be created (see [Reset Password](#))

## Reset Password

If you are a current SSIS user who has forgotten your password, on the [Log In](#) page, click the **Click here if you have forgotten your password** link to return the [Reset Password](#) page.



# State Surveyor Information System

**State Surveyor Information System Login**



**SSIS Support**  
Email: COWPROJECT@cms.hhs.gov

**Technical Support**  
Email: SSISTechSupport@cdc.gov


User Name:

Password:

[Click here if you have forgotten your password](#)

Enter your user name and click **Login**. If the user name you enter matches an active user account, a user authentication link will be emailed to your email address.






# State Surveyor Information System

**State Surveyor Information System - Reset Password**

To reset your password, enter your user name into the text box below.

User Name:



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## State Surveyor Information System

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**Technical Support**


Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

### State Surveyor Information System - Reset Password


To reset your password, enter your user name into the text box below.

User Name:

Instructions for resetting your password have been sent to your e-mail address.



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**SSIS - User setup - Message (HTML)**

File Edit View Insert Format Tools Actions Help
Reply Reply to All Forward

From: PHPP/DLS Webmaster (CDC)

To: Anderson, NaTasha (CDC/CCID/OD) (CTR)

Cc:

Subject: State Surveyor - Reset Password

This is an auto-generated e-mail. Please do not respond.

A request has been made to change your password for the State Surveyor web application. If this request was made by you, please click the link below. You will be directed to a page where you will need to correctly answer three of the authentication questions you selected during your user setup. Once completed, you will be able to reset your password and access the system.

[Click here to reset your password.](#)

Once you've received your user authentication link via email, access the link to return the [User Authentication](#) page where you must complete the authentication questions and set a new password before continuing. Upon successful completion of the questions and password reset, access the [Log In](#) page and enter your user name and new password.



## State Surveyor Information System

**SSIS Support**  
Email: [COWPROJECT@cms.hhs.gov](mailto:COWPROJECT@cms.hhs.gov)


**Technical Support**  
Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

In order to reset your password, please answer the following questions

What is the name of you first dog?

What is the make of your first car?

What is the name of the town your mother was born?



## State Surveyor Information System

**SSIS Support**  
Email: [COWPROJECT@cms.hhs.gov](mailto:COWPROJECT@cms.hhs.gov)

**Technical Support**  
Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

### State Surveyor Information System - Password Setup

- Create passwords with 8 characters or longer
- Use 3 of 4 character types: Uppercase, Lowercase, Numeric, or Special Character
- The password cannot contain your name, User Name or your e-mail address
- Passwords must be changed at least every 60 days
- New passwords can not match any of your previous 10 passwords
- Don't share your passwords or write down where others can find it

Enter Password:

Re-enter Password:



**NOTES:** After three (3) unsuccessful of answering your user authentication questions, your account will be automatically locked (see [Locked Accounts](#))

## Locked Accounts

If you unsuccessfully attempt to log into the SSIS application three (3) consecutively times or if you unsuccessfully answer your authentication questions three (3) times, your account will be locked by the system.


For immediate assistance with locked accounts, contact SSIS General Support (see [SSIS Support](#)).

# Main Menu



## NOTES:

- The options that are available are dependent on your user role.
- See the User Permission matrix ([Appendix A](#)) for details on which roles have access to these options.



## State Surveyor Information System

State Surveyor

**Administration**  
Main Menu  
Manage My Account

**SSIS Support**  
Email: COWPROJECT@cms.hhs.gov

**Technical Support**  
Email: SSISTechSupport@cdc.gov

Log Out



### State Surveyor Information System - Main Menu

**Surveys**  
[Add New Survey](#)  
[View My Incomplete Surveys \(2\)](#)  
[Search and Locate Survey](#)

**Laboratory Demographics**  
[View Laboratory Demographics](#)

**Reports**  
[Completed Survey Count Report](#)  
[Survey Actions Report](#)  
[Survey Responses Report](#)

**Resources**  
[SSIS User Manual](#)  
[CMS Links](#)



## Surveys

This section has 7 options. The options that are displayed are dependent on your user role.

- [Set Application Status](#) – Allows authorized users to set the timeframe when the SSIS system will be available for laboratory survey entries, edits, and approvals.
- [Add New Survey](#) – Allows authorized users to add a new laboratory survey.
- [View my Incomplete Surveys \(#\)](#) – Allows authorized users to select and edit an incomplete survey they are associated with.
- [Surveys Requiring Follow Up \(#\)](#) – Allows authorized users to add a laboratory survey record to an initial survey that requires a follow up.
- [Surveys Needing Revision \(#\)](#) – Allows authorized users to select and edit a survey that has been sent back from the Regional Approver to the State Surveyor for revisions.
- [Surveys Awaiting Review \(#\)](#) – Allows authorized users to select and review a laboratory survey that has been submitted by a State Surveyor or Data Entry User.
- [Search and Locate Survey](#) – Allows authorized users to search, locate and view a laboratory survey.



**NOTE:** The number in parenthesis denotes the number of records pending for each respective option.

## Laboratory Demographics

Click the **Laboratory Demographics** link to access an external browser window for the Clinical Laboratory Improvement Amendments (CLIA) Laboratory Demographics website. (See [CLIA Laboratory Demographics](#))

## Reports

This section has 4 report options. The reports that are displayed are dependent on your user role. (See [Reports](#))

- [Completed Survey Count Report](#)
- [Survey Action Report](#)
- [Survey Response Report](#)
- [Surveyor Hours Report](#)

## Resources

This section has 3 options. The resources consist of documents related to the State Surveyor project.

- [Laboratory Survey Questionnaire](#)
- [User Manual](#)
- [Crosswalk](#)
- [Model Letter to use when No Problems are Identified](#)
- [Model Letter to use for Problems Requiring Corrections](#)
- [Model Letter to use for Suggestions Only](#)
- [Model Letter to use for Required Corrections AND Suggestions Offered](#)

# Laboratory Survey



## NOTES:

- The options that are available are dependent on your user role.
- See the User Permission matrix ([Appendix A](#)) for details on which roles have access to these options.

## Adding a Laboratory Survey

### User Rights:

The following user roles can **Add a Laboratory Survey**: *State Surveyor, Data Entry User, Regional Office Approver*


To add a laboratory survey, from the [Main Menu](#) page click **Add New Survey** to return the [Laboratory Lookup](#) page. The CLIA number field is required when adding a survey.

When the CLIA number has been entered, click **Lookup** and the system will perform the following checks and display the laboratory demographic data related to the CLIA number:

- The system will verify that the CLIA number entered exists in the OSCAR database.
- The system will verify that the laboratory associated with CLIA number is an active laboratory.
- The system will verify that the laboratory is associated with a CLIA number that has a Certificate of Waiver (CW).
- The system will verify that the CLIA number is not associated with a initial survey that was conducted within the last two (2) years (i.e. 24 months from the current date).
- The system will verify that the state of the laboratory associated with CLIA number is the same state you are associated with.



**NOTE:** If the CLIA number you entered does not meet **ALL** of the conditions of the system check, then the system will not allow you to proceed in adding a new laboratory survey associated with that specified CLIA number.



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## State Surveyor Information System

State Surveyor

**Administration**  
[Main Menu](#)  
[Manage My Account](#)



**SSIS Support**  
 Email: [COWPROJECT@cms.hhs.gov](mailto:COWPROJECT@cms.hhs.gov)

**Technical Support**  
 Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

Log Out

### State Surveyor Information System - Laboratory Lookup

Confirm Laboratory	
CLIA Number:	05D0996833
Laboratory Name:	REGINALD A COATES MD
Laboratory Address:	7111 WINNETKE AVENUE CANOGA PARK, CA 91306
Laboratory Phone Number:	(818) 406-6658
Type of Facility:	PHYSICIAN OFFICE
Estimated Annual Test Volume:	1000
State Laboratory Licensure Program:	Y
Certificate of Waiver (CW) Date:	02/27/2008

Click **Confirm** to verify the laboratory demographic data and return the [Laboratory Demographics](#) page. Click **Cancel** to return the [Laboratory Lookup](#) page.




#### **NOTES:**

- The survey is divided into the following data entry sections: Laboratory Demographics, Regulations, Laboratory Best Practices, Laboratory Personnel, Survey Information, and Survey Action
- You can only enter data in the survey sections in the following chronological order: Laboratory Demographics, Regulations, Laboratory Best Practices, Laboratory Personnel, and Survey Information.
- Each survey section contains a Notes text box in which you can add comments pertaining to the respective survey section. Notes entered **CAN** be viewed by both the State Surveyor and/or Data Entry user associated with the survey as well as the Regional Office Approver.

### ❖ **Laboratory Demographics**

In the Laboratory Demographics section, information about laboratory being surveyed and the state surveyor performing the survey can be entered or changed.





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## State Surveyor Information System

State Surveyor

Administration

[Main Menu](#)

[Manage My Account](#)

SSIS Support

Email: [COWPROJECT@cms.hhs.gov](mailto:COWPROJECT@cms.hhs.gov)

Technical Support


Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

09CA0928



Laboratory Demographics

CLIA Number:	05D0996833
Laboratory Name:	REGINALD A COATES MD
Laboratory Address:	7111 WINNETKE AVENUE CANOGA PARK, CA 91306
Laboratory Phone Number:	(818) 406-6658
Type of Facility:	PHYSICIAN OFFICE
Estimated Annual Test Volume:	1000
State Laboratory Licensure Program:	Y
Certificate of Waiver (CW) Date:	02/27/2008
Demographic Change in:	<input type="checkbox"/> Address <input type="checkbox"/> Telephone
Enter known changes:	<input type="text"/>
Estimated population base:	<input type="radio"/> Urban (>=10,000) <input type="radio"/> Rural (<10,000)
Number of Different Tests:	<input type="text"/>

Initial Survey and Surveyor

Survey Entered by:	McCormick, R
Survey Entry Date:	2/23/2009
Surveyor:	<input type="text" value="Surveyor, Test"/>
Initial Survey Date:	<input type="text"/> 

Notes

Complete the fields and click **Save and Continue** to save the data and return the [Regulations](#) page. Click **Save and Exit** to save the data and return the [Edit Survey](#) page. Click **Cancel** at any time to cancel your changes and return the [Edit Survey](#) page.


## ❖ Regulations

In the Regulations section, you can answer questions related to test performed by a laboratory, manufacturer's instructions for test performed, and laboratory operations. Based on your responses, some comments fields may be required when entering an initial survey and/or follow up survey.



**IMPORTANT:** Based on the answers you have entered, the system will determine if the laboratory operates or performs testing in a manner that constitutes an imminent and serious risk to public health. If an **immediate jeopardy (IJ)** condition exists, the system will display a message stating that continuing with the data entry of the survey will notify the CMS Regional

Office and CMS Central Office. You will also be instructed to contact your Regional Office if you have not done so already.



## State Surveyor Information System

State Surveyor

Administration

Main Menu

Manage My Account

SSIS Support

Email: COWPROJECT@cms.hhs.gov

Technical Support

Email: SSISTechSupport@cdc.gov

Log Out

Regulations



1) Are all tests performed classified as waived? 493.15(c), and 493.1775(b)(3)	<input type="radio"/> Yes <input type="radio"/> No	
2) Does the laboratory have the current manufacturer's instructions for the tests performed? 493.15(e)(1)	<input type="radio"/> Yes <input type="radio"/> No	
3) Does the laboratory follow the current manufacturer's instructions for all tests performed by: 493.15(e)(1)		
3a) Using the appropriate specimen as required by the manufacturer?	<input type="radio"/> Yes <input type="radio"/> No	
3b) Adding the required reagents in the prescribed order as required by the manufacturer?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
3c) Adhering to the manufacturer's storage and handling instructions?	<input type="radio"/> Yes <input type="radio"/> No	
3d) Using the proper expiration date for the storage method?	<input type="radio"/> Yes <input type="radio"/> No	
3e) Performing the quality control if required by the manufacturer?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
3f) Performing function checks or calibration if required by the manufacturer?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
3g) Adhering to the manufacturer's instructions for confirmatory testing.	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
3h) Reporting the patients' test results as required by the manufacturer?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
3i) Performing instrument maintenance if required by the manufacturer?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
3j) Adhering to timing requirements for test incubation, result interpretation, or other procedural steps?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
4) Does the laboratory operate or perform testing in a manner that constitutes an imminent and serious risk to public health? 493.1775 (b)(1)	<input type="radio"/> Yes <input type="radio"/> No	

Notes

Save & Continue

Save & Exit


Cancel

Complete the fields and click **Save and Continue** to save the data and return the [Laboratory Best Practices](#) page. Click **Save and Exit** to save the data and return the [Edit Survey](#) page. Click **Cancel** at any time to cancel your changes and return the [Edit Survey](#) page.

### ❖ Laboratory Best Practices

In the Laboratory Best Practices section, you can answer questions related to laboratory policies, procedures, and practices. Based on your responses, some fields may be required when entering an initial survey. For a follow up survey, all fields will display responses entered on the initial survey in read-only mode.



**State Surveyor Information System**

State Surveyor

Administration

[Main Menu](#)  
[Manage My Account](#)

SSIS Support

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Technical Support

Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

[Log Out](#)

**Laboratory Best Practices**

**5) Do the testing personnel document the name of the test, lot number, and expiration date:**

5a) In the patients' charts?	<input type="radio"/> Yes <input type="radio"/> No	
5b) Elsewhere in the laboratory?	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
5c) Are laboratory personnel given training when they are newly hired?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	<input type="text"/>
5d) Are laboratory personnel evaluated to ensure that they can perform each test correctly before they are allowed to report patients' test results?	<input type="radio"/> Yes <input type="radio"/> No	
5e) Are the testing personnel given training when new test kits or systems are introduced?	<input type="radio"/> Yes <input type="radio"/> No	
5f) Are testing personnel shown how to identify inaccurate results and/or test system or device problems?	<input type="radio"/> Yes <input type="radio"/> No	
5g) Does the laboratory staff have Internet access on-site?	<input type="radio"/> Yes <input type="radio"/> No	
5h) If web-based training courses were available at the laboratory, would the testing personnel participate?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	<input type="text"/>
5i) If off-site training courses were developed for waived laboratories, would the testing personnel attend?	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
<b>6) Does the laboratory:</b>		
6a) Routinely review incoming package inserts for changes in the manufacturer's instructions?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
6b) Provide information or training based on the change? (Answer only if the previous question is YES)	<input type="radio"/> Yes <input type="radio"/> No	
6c) Has there been a change in (new) testing personnel within the last 12 months?	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
<b>7) Does the laboratory have a written policy or procedure for:</b>		
7a) Checking patient identification?	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>
7b) Keeping the patient's test report in the patient's chart?	<input type="radio"/> Yes <input type="radio"/> No	
<b>8) Does the laboratory have a written policy or procedure to identify:</b>		
8a) Instrument or device error codes?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	<input type="text"/>
8b) Internal (procedural) quality control failure?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
8c) External (liquid) quality control failure?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
8d) Is the laboratory enrolled in voluntary proficiency testing?	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>






Complete the fields and click **Save and Continue** to save the data and return the [Laboratory Personnel](#) page. Click **Save and Exit** to save the data and return the [Edit Survey](#) page. Click **Cancel** at any time to cancel your changes and return the [Edit Survey](#) page.

## ❖ Laboratory Personnel

In the Laboratory Personnel section, you can answer questions related to the Laboratory Director and testing personnel. Based on your responses, some fields may be required when entering an initial survey. For a follow up survey, all fields will display responses entered on the initial survey in read-only mode.



**State Surveyor Information System**

State Surveyor

**Administration**  
[Main Menu](#)  
[Manage My Account](#)

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**Technical Support**  
 Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

Log Out

**Laboratory Personnel**

9) Testing Personnel  
(Select all that apply)

☐ Dentist

☐ Physician (M.D., D.O.)

☐ Podiatrist (D.P.M.)

☐ Physician's Assistant

☐ Registered Nurse (R.N.)

☐ Nurse Practitioner

☐ Licensed Practical Nurse (LPN)

☐ Medical Technologist (B.S.)

☐ Pharmacist

☐ EMT

☐ Medical Laboratory Technician - MLT (A.A.)

☐ Medical Assistant

☐ Military Training

☐ High School Diploma

☐ Other (please specify)

10) Laboratory Director  
(Select all that apply)

☐ Dentist

☐ Physician (M.D., D.O.)

☐ Podiatrist (D.P.M.)

☐ Physician's Assistant

☐ Registered Nurse (R.N.)

☐ Nurse Practitioner

☐ Licensed Practical Nurse (LPN)

☐ Medical Technologist (B.S.)

☐ Pharmacist

☐ Medical Laboratory Technician - MLT (A.A.)

☐ Medical Assistant

☐ Military Training

☐ High School Diploma

☐ Other (please specify)


Comments


**Notes**

Save & Continue

Save & Exit

Cancel






Complete the fields and click **Save and Continue** to save the data and return the [Survey Information](#) page. Click **Save and Exit** to save the data and return the [Edit Survey](#) page. Click **Cancel** at any time to cancel your changes and return the [Edit Survey](#) page.

## ❖ Survey Information

In the Survey Information section, you can answer questions related to the completion of a laboratory survey.



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## State Surveyor Information System

State Surveyor

**Administration**  
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[Manage My Account](#)

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**Technical Support**  
 Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

[Log Out](#)

**Survey Information**



11) Survey Time in Hours:	
11a) Pre-Survey	Hours: <input type="text"/> Minutes: <input type="text"/>
11b) On-site / Telephone	Hours: <input type="text"/> Minutes: <input type="text"/>
11c) Travel	Hours: <input type="text"/> Minutes: <input type="text"/>
11d) Post-Survey	Hours: <input type="text"/> Minutes: <input type="text"/>
11e) Supervisory Review (if applicable)	Hours: <input type="text"/> Minutes: <input type="text"/>

**Laboratory Feedback**

12) Did you give the laboratory the 668B? ☐ Yes ☐ No

13) Describe any situations where waived testing caused a problem with a patient. (List the type of testing, inaccurate results, etc.)

**Notes**

Complete the fields and click **Save and Continue** to save the data and return the [Survey Action](#) page. Click **Save and Exit** to save the data and return the [Edit Survey](#) page. Click **Cancel** at any time to cancel your changes and return the [Edit Survey](#) page.


### ❖ Survey Action

Based on the answers you entered on the laboratory survey, the appropriate survey action(s) for the laboratory will be displayed.



**NOTE:** The possible Survey Actions are:

- Congratulatory Letter
- Letter of Required Corrections
- Letter of Required Corrections and Suggestions
- Letter of Suggestions
- Form 2567

**State Surveyor Information System**

State Surveyor

Administration  
Main Menu  
Manage My Account



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Log Out

**SURVEY ACTION**  
Letter of Congratulations

Save & submitReturn to Edit



Click **Save and Submit** to save the data, send the record to the Regional Office Approver for review and return the [Edit Survey](#) page. Click **Return to Edit** to go to the [Edit Survey](#) page to make updates to the laboratory survey.

## Editing a Laboratory Survey

### **User Rights:**

The following user roles can **Edit a Laboratory Survey**: *State Surveyor, Data Entry, Regional Office Approver*

### ❖ **View my Incomplete Surveys**



#### **NOTES:**

- If you are a State Surveyor or Data Entry User, you can only edit a survey with an “In process” status that you are associated with.
- The system will only display incomplete surveys for the current fiscal year.

To view an incomplete survey, from the [Main Menu](#) page, click **View my Incomplete Surveys** link to return the [View my Incomplete Surveys](#) page. Click **Edit** next to the laboratory survey that you would like to view to return the [Edit Survey](#) page. Click **Edit** next to the survey section you would like to complete (see [Adding a Laboratory Survey](#)).

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State Surveyor

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[Log Out](#)

**State Surveyor Information System - Main Menu**


**Surveys**  
[Add New Survey](#)  
[View My Incomplete Surveys \(2\)](#)  
[Search and Locate Survey](#)

**Laboratory Demographics**  
[View Laboratory Demographics](#)

**Reports**  
[Completed Survey Count Report](#)  
[Survey Actions Report](#)  
[Survey Responses Report](#)

**Resources**  
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## State Surveyor Information System

State Surveyor

Administration

Main Menu

Manage My Account

SSIS Support

Email: COWPROJECT@cms.hhs.gov

Technical Support

Email: SSISTechSupport@cdc.gov

Log Out

Laboratory Demographics <a href="#" style="color: #0056b3; font-size: small;">Collapse</a>	Incomplete	<a href="#" style="color: #0056b3; font-size: small;">Edit</a>
CLIA Number:	05D0869295	
Laboratory Name:	SAIED DALLALZADEH MD, PEDIATRIC GAS-	
Laboratory Address:	16661 VENTURA BLVD #613 ENCINO, CA 91436	
Laboratory Phone Number:	(818) 863-3047	
Type of Facility:	PHYSICIAN OFFICE	
Estimated Annual Test Volume:	0	
State Laboratory Licensure Program:	Y	
Certificate of Waiver (CW) Date:	07/08/2007	
Demographic Change in:		
Enter known changes:		
Estimated population base:	Urban	
Number of Different Tests:	2	

Regulations <a href="#" style="color: #0056b3; font-size: small;">Expand</a>	Incomplete	<a href="#" style="color: #0056b3; font-size: small;">Edit</a>
--	------------	--

Laboratory Best Practices <a href="#" style="color: #0056b3; font-size: small;">Expand</a>	Incomplete	<a href="#" style="color: #0056b3; font-size: small;">Edit</a>
--	------------	--



Laboratory Personnel <a href="#" style="color: #0056b3; font-size: small;">Expand</a>	Incomplete	<a href="#" style="color: #0056b3; font-size: small;">Edit</a>
---	------------	--

Survey Information <a href="#" style="color: #0056b3; font-size: small;">Expand</a>	Incomplete	<a href="#" style="color: #0056b3; font-size: small;">Edit</a>
---	------------	--

Survey Action <a href="#" style="color: #0056b3; font-size: small;">Expand</a>
--

When all the information has been entered, click **Save and Continue** to save the data and return the next survey section's data entry page (see [Adding a Laboratory Survey](#)).

### ❖ Surveys Requiring Follow Up




#### NOTES:

- This option will only be displayed when a survey in the state (Surveyors) or region (Regional Office Approvers) you are associated with has a follow up survey to be completed.
- Surveys displayed will **only** include surveys where the laboratory associated with the survey is in the same state (Surveyors) or region (Regional Office Approvers) you are associated with; and the CLIA number associated with the survey is **not** associated with a follow up survey that is currently in process.
- For a follow up survey, the only survey sections that can be completed are Laboratory Demographics, Regulations, and Survey Information.

To view and select an initial laboratory survey that requires a follow up survey, from the [Main Menu](#) page, click **Surveys Requiring Follow Up** to return the [Surveys Requiring Follow Up](#) page.





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## State Surveyor Information System

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[Log Out](#)

### State Surveyor Information System - Main Menu

Surveys

[Add New Survey](#)

[Surveys Requiring Follow Up \(1\)](#)

[Search and Locate Survey](#)

Laboratory Demographics

[View Laboratory Demographics](#)

Reports

[Completed Survey Count Report](#)



[Survey Actions Report](#)

[Survey Responses Report](#)

Resources

[SSIS User Manual](#)

[CMS Links](#)

To add a follow up survey, click **Enter Follow Up Survey** next to the initial laboratory survey to return the [Laboratory Demographics](#) page. Click **Edit** next to the survey section you would like to complete (see [Adding a Laboratory Survey](#)). You will be asked to confirm your selection to enter the follow up survey. To view the details of the initial survey, but NOT enter the follow up survey, click **View Details**.

#### Surveys Requiring Followup

**Make sure you are ready to complete and submit a follow up survey before entering one.**

**Click 'View details' link if you wish to see the details of initial survey.**

CLIA Number	Initial Survey Date	Survey Number	Laboratory Name	Laboratory Address		
25D0697511	4/3/2009	04MS096	COTTAGE GROVE NURSING HOME	1116 FOREST AVENUE JACKSON, MS 39206	<a href="#">View details</a>	<a href="#">Enter follow up survey</a>

#### Message from webpage



Click Cancel if you are NOT ready to enter follow up survey results AND submit to RO for approval.

OK

Cancel



When all the information has been entered, click **Save and Continue** to save the data and return the next survey section's data entry page (see [Adding a Laboratory Survey](#)).

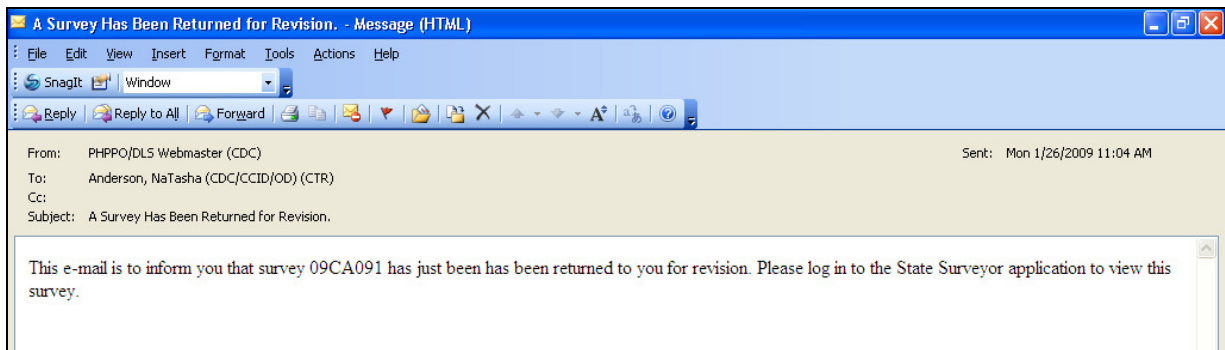
Once all data has been entered, click **Save and Submit** to save the data, send the record to the Regional Office Approver for review and return the [Edit Survey](#) page. Click **Return to Edit** to go to the [Edit Survey](#) page to make updates to the laboratory survey.

## ❖ Surveys Needing Revision




### NOTES:

- This option will only be displayed when a survey has been sent from a Regional Office Approver back to the State Surveyor for revisions.
- The system will only display surveys needing revision for the current fiscal year.
- You will receive an email if your survey has been returned.
- You can only modify sections that have been flagged by a Regional Office Approver.



To view a survey needing revision, from the [Main Menu](#) page, click **Surveys Needing Revision** to return the [Surveys Needing Revision](#) page. Click **Select** next to the laboratory survey that you would like to view and the system will display the [Edit Survey](#) page. Click **Edit** next to the survey section you would like to complete (see [Adding a Laboratory Survey](#)).



# State Surveyor Information System

State Surveyor

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**SSIS Support**

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Log Out

**State Surveyor Information System - Main Menu**

Surveys

Add New Survey

View My Incomplete Surveys (2)

Surveys Needing Revision (1)

Search and Locate Survey

Laboratory Demographics

View Laboratory Demographics

Reports

Completed Survey Count Report



Survey Actions Report

Survey Responses Report

Resources

SSIS User Manual

CMS Links

When all the information has been entered, click **Save and Continue** to save the data and return the next survey section's data entry page (see [Adding a Laboratory Survey](#)).

Once all data has been entered, click **Save and Submit** to save the data, send the record to the Regional Office Approver for review and return the [Edit Survey](#) page. Click **Return to Edit** to go to the [Edit Survey](#) page to make updates to the laboratory survey.

## ❖ Edit Survey Page

To edit laboratory survey data, click **Edit** located in the section you would like to edit.



### NOTES:

- The survey is divided into the following data entry sections: Laboratory Demographics, Regulations, Laboratory Best Practices, Laboratory Personnel, Survey Information, and Survey Action
- You can only enter data in the survey sections in the following chronological order: Laboratory Demographics, Regulations, Laboratory Best Practices, Laboratory Personnel, and Survey Information.
- You can only edit data in a survey section if the preceding survey section has been completed.
- For a follow up survey, the only survey sections that can be completed are Laboratory Demographics, Regulations, and Survey Information.
- For a survey needing revision, you can only modify sections that have been flagged by a Regional Office Approver.



## State Surveyor Information System

State Surveyor

### Administration

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[Manage My Account](#)

### SSIS Support

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### Technical Support

Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

[Log Out](#)

### Laboratory Demographics [Collapse](#) **Incomplete** [Edit](#)

CLIA Number:	05D0869295
Laboratory Name:	SAIED DALLALZADEH MD, PEDIATRIC GAS-
Laboratory Address:	16661 VENTURA BLVD #613 ENCINO, CA 91436
Laboratory Phone Number:	(818) 863-3047
Type of Facility:	PHYSICIAN OFFICE
Estimated Annual Test Volume:	0
State Laboratory Licensure Program:	Y
Certificate of Waiver (CW) Date:	07/08/2007
Demographic Change in:	
Enter known changes:	
Estimated population base:	Urban
Number of Different Tests:	2

### Regulations [Expand](#) **Incomplete** [Edit](#)

### Laboratory Best Practices [Expand](#) **Incomplete** [Edit](#)

### Laboratory Personnel [Expand](#) **Incomplete** [Edit](#)

### Survey Information [Expand](#) **Incomplete** [Edit](#)

### Survey Action [Expand](#)



## Deleting a Laboratory Survey

### User Rights:


The following user roles can **Delete a Laboratory Survey**: *CDC Administrator, State Surveyor, Data Entry User, and Regional Office Approver*



### NOTES:

- A Data Entry User, State Surveyor, or Regional Office Approver can only delete a survey that you are associated with.

If you are a State Surveyor or Data Entry user, to delete a laboratory survey, from the [View my incomplete Surveys](#) page, click **Delete**, and verify the delete request to return the [Delete Survey](#) page. An explanation of why the survey is being deleted is required.



### State Surveyor Information System

State Surveyor



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**Technical Support**  
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[Log Out](#)

Last Saved	Survey Number	Status	Surveyor	Lab Name	Lab City	Lab State		
12/31/2008	09CA081	In Process	NaTasha Anderson	NUBAR SETHIAN MD	PASADENA	CA	<a href="#">Edit</a>	<a href="#">Delete</a>
	09CA083	In Process		SAIED DALLALZADEH MD, PEDIATRIC GAS-	ENCINO	CA	<a href="#">Edit</a>	<a href="#">Delete</a>





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**Technical Support**  
Email: SSISTechSupport@cdc.gov

Log Out

**Delete Survey**

Please explain why this survey is being deleted.

Submit Cancel

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When all the information is entered, click **Submit** to delete the survey or click **Cancel** at any time to cancel your changes and return the [Main Menu](#) page.

## Searching and Locating a Laboratory Survey

### User Rights:


The following user roles can **Search and Locate a Laboratory Survey**: *CDC Administrator, CMS Lead, Regional Office Approver, State Supervisor, State Surveyor, and Data Entry User*



### NOTES:

- For non-CDC users, only surveys that have the following statuses will be displayed when performing a search and locate:
  - Completed Approval
  - Deleted Complete
- If you are a state user, the search results are restricted to your state only.
- If you are a regional user, you can filter the search criteria by state or view the search results for the entire region.
- If no search criteria are selected, then the search results will return unfiltered results.

To search and locate a survey, from the [Main Menu](#) page, click **Search and Locate Survey** to return the [Search and Locate Laboratory Survey](#) page.



## State Surveyor Information System

State Surveyor

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**SSIS Support**



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**Technical Support**

Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

[Log Out](#)

### Search and Locate Laboratory Surveys

Survey Date Range: From:   To:  


CLIA Number:

Survey Number:

Survey Type: ☐ Initial Survey ☐ Follow Up Survey ☒ All

State Surveyor: ☐ NaTasha Anderson

Results per Page:



## State Surveyor Information System

State Surveyor

**Administration**

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**SSIS Support**



Email: [COWPROJECT@cms.hhs.gov](mailto:COWPROJECT@cms.hhs.gov)

**Technical Support**

Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

[Log Out](#)

### Search and Locate Laboratory Surveys

Survey Date Range: From:   To:  

CLIA Number:

Survey Number:



Survey Type: ☐ Initial Survey ☐ Follow Up Survey ☒ All

State Surveyor: ☐ NaTasha Anderson

Results per Page:

Search Results:

CLIA Number	Survey Date	Survey Number	Survey Status	State Surveyor's Name	Laboratory Name	Laboratory City	Laboratory State	
05d1034989	02/03/2009	09CA092	Completed Approval	NaTasha Anderson	BEVERLY INTERNAL MEDICINE GRP INC	MONTEBELLO CA		<a href="#">View</a>

When all the search criteria are entered, click **Submit** to return the search results or click **Clear** at any time to cancel your search criteria and return to the [Search and Locate Laboratory Survey](#) page. Click **View** to return the [Survey](#) page in view only mode in a new browser window.

# Administration



## NOTES:

- The options that are available are dependent on your user role.
- See the User Permission matrix ([Appendix A](#)) for details on which roles have access to these options.

The administration functions, which appear on the [Main Menu](#) page, are used by authorized users to perform various functions in the system.

1. [Manage my Account](#) – Allows authorized users to view, add or edit password and contact information; and indicate whether email notifications should be sent when a survey is approved.
2. [Add User](#) – Allows authorized users to add SSIS users as well as indicate system access rights.
3. [Edit User](#) – Allows authorized users to view or edit SSIS user's information and system access rights.
4. [Set Application Status](#) – Allows authorized users to set the date when the SSIS system will be available for survey entries, edits, and approvals.



## Manage my Account

You can change your password and/or security questions; indicate whether you want to receive emails when your survey is approved; and/or view, add, or update your contact information.

### ❖ Changing a password

#### **User Rights:**

The following user roles can **Change a Password**: *CMS Lead, CMS Report User, Regional Office Approver, Regional Read Only, State Supervisor, State Read Only, State Surveyor, and Data Entry User*

To change your password, from the [Administration](#) menu, click **Manage my Account**, and then click **Change Password** to return the [Password Setup](#) page. The old password and new password fields are required fields.

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**State Surveyor Information System**

State Surveyor

Administration  
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Manage My Account

**SSIS Support**  
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**Technical Support**  
Email: SSISTechSupport@cdc.gov

Log Out

**Manage User Account**

System Access

[Change Password](#)  
[Change Security Questions](#)

E-mail Notification

☐ Yes ☒ No Send email notification when my survey has been approved

Update

Office Information

Address 1:

Address 2:

City:  State: CA  Zip 1:  Zip 2:

Work phone:  -  -

Cell phone:  -  -

Update

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Complete all the required fields and click **Submit** to save the data and return the [Main Menu](#) page.

## ❖ Changing Security Questions and/or Responses


### **User Rights:**

The following user roles can **Change Security Questions and/or Responses**: *CMS Lead, CMS Report User, Regional Office Approver, Regional Read Only, State Supervisor, State Read Only, State Surveyor, and Data Entry User*



**NOTE:** The responses to the security questions will be used to reset forgotten passwords.

To change a security question and/or response, from the [Administration](#) menu, click **Manage my Account**, and then click **Change my Security Questions** link to return the [User Authentication](#) page. The system will display the most recent questions you had selected and answered.



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[Log Out](#)

**Change Security Questions**

You must answer 5 questions in order to proceed.  
These questions will be used to reset a forgotten password.

**Selected Questions List**

<a href="#">Remove</a>	What is your mother's maiden name?
<a href="#">Remove</a>	What is your favorite color?
<a href="#">Remove</a>	What state were you born in?
<a href="#">Remove</a>	What is the make of your first car?
<a href="#">Remove</a>	What is the name of the town your mother was born?



**NOTE:** Since you can only select and answer five (5) security questions, in order to change a security question and/or response, you will have to first remove one of the current questions in order to select a question to answer. Click **Remove** located next to the question you would like to remove.


When all the information has been entered, click **Save and Continue** to save the data and return the [Manage my Account](#) page.

## ❖ Denoting Email Notification

### **User Rights:**

The following user roles can **indicate whether Email Notifications should be sent when survey is approved**: *State Surveyor and Data Entry User*

To indicate whether an email should be sent when your survey has been approved, from the [Administration](#) menu, click **Manage my Account** to return the [Manage User Account](#) page. In the **Email Notification** section of the page, select your answer to the **Send email notification when my survey has been approved** question, and click **Update**.



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# State Surveyor Information System

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**Technical Support**  
 Email: SSISTechSupport@cdc.gov

[Log Out](#)

## Manage User Account

**System Access**

[Change Password](#)

[Change Security Questions](#)

**E-mail Notification**

☐ Yes
 ☒ No
 Send email notification when my survey has been approved

[Update](#)

**Office Information**

Address 1:

Address 2:

City:  State: CA Zip 1:  Zip 2:

Work phone:  -  -

Cell phone:  -  -

[Update](#)




**NOTE:** The default response is to **NOT** send an email upon approval of a survey.

## ❖ Adding or Updating Contact Information

### **User Rights:**

The following user roles can **Add and/or Update Contact Information**: *CMS Lead, CMS Report User, Regional Office Approver, Regional Read Only, State Supervisor, State Read Only, State Surveyor, and Data Entry User*

To add or update your contact information, from the [Administration](#) menu, click **Manage my Account** to return the [Manage User Account](#) page. In the **Office Information** section of the page, complete the required fields and click **Update**. Completing the optional fields increases the effectiveness of the SSIS program.



**State Surveyor Information System**

State Surveyor

Administration

Main Menu

Manage My Account

SSIS Support

Email: COWPROJECT@cms.hhs.gov

Technical Support

Email: SSISTechSupport@cdc.gov

Log Out

### Manage User Account

System Access

[Change Password](#)

[Change Security Questions](#)

E-mail Notification

☐ Yes ☒ No      Send email notification when my survey has been approved

Office Information



Address 1:

Address 2:

City:       State:       Zip 1:       Zip 2:

Work phone:  -  -

Cell phone:  -  -



## Adding a User

You can add SSIS users and indicate their access rights to the system's functions.

### User Rights:

The following user roles can **Add a User**: *CDC Administrator and CMS Lead*



#### NOTES:


- A CDC Administrator user can **ONLY** add the following user roles to the system: CDC Administrator, CMS Lead, CDC Report User (Read Only).
- A CMS Lead user can **ONLY** add the following user roles to the system: CMS Report User (Read Only), Regional Office Approver, State Supervisor, State Surveyor, Data Entry, Regional Read Only, and State Read Only.

To add a user, from the [Administration](#) menu, click **Add User** to return the [Add User](#) page. Based on the type of user role you are adding, the system will display the appropriate additional fields that have to be completed.



#### NOTES:

- When adding a CDC Administrator or CDC Report User (Read Only) user, the System User Role and CDC User ID fields are required.
- When adding a CMS Lead, CMS Report User (Read Only), Regional Office Approver, Regional Read Only, State Supervisor, State Read Only, State Surveyor, or Data Entry User, the System User Role, First Name, Last Name, and Email are required fields. Also, you will be required to indicate whether the user being added is authorized to use the SSIS system by reading and selecting the authentication clause.
- When adding a state user role (e.g. State Supervisor, State Read Only, State Surveyor, or Data Entry user) the State field is required.
- When adding a regional user role (e.g. Regional Office Approver, or Read Only) the Region field is required.



# State Surveyor Information System

CMS Lead

**Administration**  
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[Edit User](#)  
[Add User](#)

**SSIS Support**  
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**Technical Support**  
Email: SSISTechSupport@cdc.gov

[Log Out](#)



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# State Surveyor Information System

CMS Lead

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**SSIS Support**  
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Email: SSISTechSupport@cdc.gov

[Log Out](#)

## Add a New System User

System User Role:



First name:

Last name:

E mail address:

State:

☐ I agree that this user has been validated and is permitted to use the State Surveyor web application.

When all the information has been entered, click **Add User** to add the user. The user will be added to the system users list and a one-time use authentication link will be sent to the added user's email account (see [User Authentication](#)).

## Editing a User

You can view or edit SSIS user's information and their access rights to the system's functions.

### User Rights:

The following user roles can **Edit a User**: *CDC Administrator and CMS Lead*




**NOTE:** A CMS Lead user will have to first search and locate the user that is to be edited.

To edit a user, from the [Administration](#) menu, click **Edit User** to return the [Edit System User](#) page.

For a CMS Lead user, you will have to first complete the First Name, Last Name, Email, Status, Region, and/or State fields to search and locate the user to be edited and click **Search**. In the Search Results section, click **Edit** located next to the user's name and their information will populate the data entry fields.

For a CDC Administrator user, click **Edit** located next to the user's name and their information will populate the data entry fields.



# State Surveyor Information System

CMS Lead

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Add User

**SSIS Support**  
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**Technical Support**  
Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

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**Technical Support**

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[Log Out](#)

**Edit System Users**


First Name:

Last Name:

E Mail:

Status: ☐ Active ☐ Inactive ☒ All

System User Role	System User	E mail	Region	Status	
State Surveyor	William J. Clinton	<a href="mailto:cbill@gmail.com">cbill@gmail.com</a>	New York	Active	<a href="#">Edit</a>
State Surveyor	barak obama	<a href="mailto:jzhong@cdc.gov">jzhong@cdc.gov</a>	Chicago	Active	<a href="#">Edit</a>
CMS Report User	56456 234234234	<a href="mailto:cmx@gmail.com">cmx@gmail.com</a>		Active	<a href="#">Edit</a>
Regional Office Approver	Tim Timey	<a href="mailto:tt1@gmail.com">tt1@gmail.com</a>	Boston	Active	<a href="#">Edit</a>



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**Technical Support**

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[Log Out](#)

**Edit System Users**

System User Role:



First Name:

Last Name:

E mail:

State:

Status: ☒ Active ☐ Inactive

Make all appropriate changes to the user's information and click **Update** to complete the update. Click **Cancel** at any time to cancel your changes and return the [Edit System User](#) page.

## ❖ Inactivating a User's Account

You can inactivate a current user of the system which will remove the user's ability to access the system, thereby inactivating their user account.



**NOTE:** An inactivated user's record will be retained in the system for historical use.

### User Rights:

The following user roles can **Inactivate a User**: *CDC Administrator and CMS Lead*

To inactivate a user, from the [Administration](#) menu, click **Edit User** to return the [Edit System Users](#) page. Enter search criteria and click **Search**. Click **Edit** located next to the user's name whose account you would like to inactivate.

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**Technical Support**  
Email: SSISTechSupport@cdc.gov

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**Technical Support**

Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

[Log Out](#)

**Edit System Users**


First Name:

Last Name:

E Mail:

Status: ☐ Active ☐ Inactive ☒ All

System User Role	System User	E mail	Region	Status	
State Surveyor	William J. Clinton	<a href="mailto:cbill@gmail.com">cbill@gmail.com</a>	New York	Active	<a href="#">Edit</a>
State Surveyor	barak obama	<a href="mailto:jzhong@cdc.gov">jzhong@cdc.gov</a>	Chicago	Active	<a href="#">Edit</a>
CMS Report User	56456 234234234	<a href="mailto:cmx@gmail.com">cmx@gmail.com</a>		Active	<a href="#">Edit</a>
Regional Office Approver	Tim Timey	<a href="mailto:tt1@gmail.com">tt1@gmail.com</a>	Boston	Active	<a href="#">Edit</a>



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**Technical Support**

Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

[Log Out](#)

**Edit System Users**

System User Role:



First Name:

Last Name:

E mail:

State:

Status: ☒ Active ☐ Inactive

Select **Inactive** as the Status and click **Update** to inactivate the user's account. Click **Cancel** at any time to cancel your changes and return to the [Edit System User](#).


### ❖ Activating a User's Account

You can activate the account of a system user who has been previously inactivated. Activating a user's account will restore the user's ability to access the system.

**User Rights:**

The following user roles can **Activate a User**: *CDC Administrator and CMS Lead*

To activate a user, from the [Administration](#) menu, click **Edit User** to return the [Edit System Users](#) page. Enter search criteria and click **Search**. Click **Edit** located next to the user's name whose account you would like to activate.



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**Technical Support**  
Email: SSISTechSupport@cdc.gov

[Log Out](#)

### Edit System Users


**First Name:**

**Last Name:**

**E Mail:**

**Status:** ☐ Active ☐ Inactive ☒ All

System User Role	System User	E mail	Region	Status	
State Surveyor	William J. Clinton	cbill@gmail.com	New York	Active	<a href="#">Edit</a>
State Surveyor	barak obama	jzhong@cdc.gov	Chicago	Active	<a href="#">Edit</a>
CMS Report User	56456 234234234	cmx@gmail.com		Active	<a href="#">Edit</a>
Regional Office Approver	Tim Timey	tt1@gmail.com	Boston	Active	<a href="#">Edit</a>



# State Surveyor Information System

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**Technical Support**  
Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

## Edit System Users

System User Role: State Surveyor

First Name: Ryan

Last Name: CalSurveyor



E mail: ryan.mccormick.cdc@ees.hhs.gov

State: CA - CALIFORNIA

Status: ☒ Active ☐ Inactive

Update Cancel

Log Out



Select **Active** as the Status and click **Update** to activate the user's account. Click **Cancel** at any time to cancel your changes and return to the [Edit System User](#).

## Setting Application Status

You can set the dates when the SSIS system will be available for survey entries, edits, and approvals.

### **User Rights:**

The following user roles can **Set Application Status**: *CDC Administrator and CMS Lead*

To set the dates when the SSIS application will be available for laboratory survey entry, laboratory survey edits and survey approvals, on the [Main Menu](#) page, under the **Survey** section header, click **Set Application Status** to return the [Set Application](#) page.

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**SSIS Support**  
Email: COWPROJECT@cms.hhs.gov

**Technical Support**  
Email: SSISTechSupport@cdc.gov

Log Out

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CMS Lead

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**Technical Support**



Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

[Log Out](#)

**Set Application Status**

Data Entry ☒ Open ☐ Close

Survey Accepted On/After Date  



## NOTES:

- In relation to the *Data Entry* field, if you select **Open**, the system will allow approved users to add, edit, or approve laboratory surveys on or after the date you indicate. All fields are required when indicating that the Data Entry is Open.
- In relation to the *Data Entry* field, if you select **Close**, the system will **NOT** allow approved users to add, edit, or approve laboratory surveys.

Select the Data Entry type and date (if applicable). Click **Submit** to save the data and return the [Main Menu](#) page. Click **Cancel** at any time to cancel your changes and return to the [Main Menu](#) page.

# Approval Process

## Review Laboratory Survey

Once a laboratory survey has been completed and submitted by a State Surveyor or Data Entry user, the record goes through an approval process in which the Regional Office Approver reviews the laboratory survey record.

### User Rights:

The following user roles can **Review Laboratory Survey**: *Regional Office Approver*

The following user roles can **Flag a Laboratory Survey Section**: *Regional Office Approver*

The following user roles can **Add Review Notes**: *Regional Office Approver, State Surveyor, and Data Entry User*

To select a laboratory survey that has been submitted, from the [Main Menu](#) page, click **Surveys Awaiting Review** to return the [Surveys Awaiting Review](#) page. Click **Select** next to the survey record you would like to review to return the [Review Laboratory Survey](#) page.

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**Technical Support**  
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[Log Out](#)

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**Technical Support**


Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

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### Surveys Awaiting Review

Last Saved	Survey Number	Follow-Up Survey	Surveyor	Lab Name	Lab City	Lab State	
2/23/2009	09CA0928	N	Test Surveyor	REGINALD A COATES MD	CANOGA PARK	CA	<a href="#">Select</a>
2/11/2009	09CA0923	N	Test Surveyor	THIRD STREET SURGERY CENTER, LP	LOS ANGELES	CA	<a href="#">Select</a>
2/11/2009	09CA0913-1	Y	Test Surveyor	AEGIS MEDICAL SYSTEMS INC	SIMI VALLEY	CA	<a href="#">Select</a>
1/29/2009	09CA098	N	Test Surveyor	SIAMAK TABIB MD INC	LOS ANGELES	CA	<a href="#">Select</a>
1/29/2009	09CA099-1	Y	Test Surveyor	A SHAWN ADHAMI MD A PROFESSIONAL CORP	MONTEBELLO	CA	<a href="#">Select</a>
1/29/2009	09CA097	N	Test Surveyor	SOUTH VALLEY INTERNAL MEDICINE, INC	TARZANA	CA	<a href="#">Select</a>



## State Surveyor Information System

Regional Office Approver

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**Technical Support**

Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

[Log Out](#)

### Review Laboratory Survey

**Laboratory Demographics** [Collapse](#) [View](#)

CLIA Number:	05D0996833
Laboratory Name:	REGINALD A COATES MD
Laboratory Address:	7111 WINNETKE AVENUE CANOGA PARK, CA 91306
Laboratory Phone Number:	(818) 406-6658
Type of Facility:	PHYSICIAN OFFICE
Estimated Annual Test Volume:	1000
State Laboratory Licensure Program:	Y
Certificate of Waiver (CW) Date:	02/27/2008
Demographic Change in:	
Enter known changes:	
Estimated population base:	Urban
Number of Different Tests:	100

**Regulations** [Expand](#)


**Laboratory Best Practices** [Expand](#)

**Laboratory Personnel** [Expand](#)

**Survey Information** [Expand](#)

**Survey Action** [Expand](#)

[Cancel](#)






#### NOTES:

- The survey is divided into the following data entry sections: Laboratory Demographics, Regulations, Laboratory Best Practices, Laboratory Personnel, Survey Information, and Survey Action
- The Regional Office Approver can only review data in the survey sections in the following chronological order: Laboratory Demographics, Regulations, Laboratory Best Practices, Laboratory Personnel, Survey Information, and Survey Action.
- A Regional Office Approver can only add notes to a survey section but can **NOT** make changes to the laboratory survey being reviewed.

To review a laboratory survey section, click **View**, in the Laboratory Demographics section to display the [Laboratory Demographics](#) page.

### ❖ Laboratory Demographics

In the Laboratory Demographics section, you can review the answers to questions related to the laboratory being surveyed and the State Surveyor and/or Data Entry User who conducted the survey.

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**Technical Support**  
Email: SSISTechSupport@cdc.gov

**Log Out**

**Laboratory Demographics**

CLIA Number:	05D0996833
Laboratory Name:	REGINALD A COATES MD
Laboratory Address:	7111 WINNETKE AVENUE CANOGA PARK, CA 91306
Laboratory Phone Number:	(818) 406-6658
Type of Facility:	PHYSICIAN OFFICE
Estimated Annual Test Volume:	1000
State Laboratory Licensure Program:	Y
Certificate of Waiver (CW) Date:	02/27/2008
Demographic Change in:	<input type="checkbox"/> Address <input type="checkbox"/> Telephone
Enter known changes:	
Estimated population base:	<input checked="" type="radio"/> Urban (>=10,000) <input type="radio"/> Rural (<10,000)
Number of Different Tests:	100

**Initial Survey and Surveyor**

Survey Entered by:	McCormick, R
Enter Date:	02/23/2009
Surveyor:	Surveyor, Test
Initial Survey Date:	02/23/2009

**Notes**

☐ Flag this section

Save & Continue Save & Exit Cancel

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## ○ Flag this Section

You can add a flag to the section to indicate that the section needs to be modified by the State Surveyor or Data Entry user who is associated with the survey.



### NOTES:

- Entering text in the Notes field is required when a laboratory survey section has been flagged.
- For a follow up survey, a Regional Office Approver can **ONLY** flag the following laboratory survey sections:
  - Laboratory Demographics
  - Regulations
  - Survey Information
- For a follow up survey, a Regional Office Approver can **ONLY** view in read-only mode the following laboratory survey section:
  - Laboratory Best Practices
  - Laboratory Personnel

To flag a section in a laboratory survey, on the respective survey section page, select the **Flag this Section** option, and enter notes.

## ○ Notes

Notes are useful to indicate revisions that need to be made by the State Surveyor, notes made by the Regional Office Approver to the State Surveyor and/or Data Entry User, or comments regarding particular information in respective survey section.



### NOTES:


- For State Surveyor and Data Entry users, you can add Notes to any laboratory survey section.
- For Regional Office Approver users, you can **ONLY** add notes when you have selected the **Flag this Section** option on a survey section page.

To add a note, on the respective Laboratory Survey section page, enter notes in Notes text box located at the bottom of the section.

When all information has been entered, click **Save and Continue** to save the data and return to the [Regulations](#) page. Click **Save and Exit** to save the data and go to the [Review Laboratory Survey](#) page. Click **Cancel** at any time to cancel your changes and return to the [Review Laboratory Survey](#) page.

## ❖ Regulations

In the Regulations section, you can review answers to questions related to test performed by a laboratory, manufacturer's instructions for test performed, and laboratory operations.



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Technical Support

Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

[Log Out](#)

**Regulations**

1) Are all tests performed classified as waived? 493.15(c), and 493.1775(b)(3)	<input checked="" type="radio"/> Yes <input type="radio"/> No	
2) Does the laboratory have the current manufacturer's instructions for the tests performed? 493.15(e)(1)	<input checked="" type="radio"/> Yes <input type="radio"/> No	
3) Does the laboratory follow the current manufacturer's instructions for all tests performed by: 493.15(e)(1)		
3a) Using the appropriate specimen as required by the manufacturer?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
3b) Adding the required reagents in the prescribed order as required by the manufacturer?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
3c) Adhering to the manufacturer's storage and handling instructions?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
3d) Using the proper expiration date for the storage method?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
3e) Performing the quality control if required by the manufacturer?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
3f) Performing function checks or calibration if required by the manufacturer?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
3g) Adhering to the manufacturer's instructions for confirmatory testing.	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
3h) Reporting the patients' test results as required by the manufacturer?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
3i) Performing instrument maintenance if required by the manufacturer?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
3j) Adhering to timing requirements for test incubation, result interpretation, or other procedural steps?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
4) Does the laboratory operate or perform testing in a manner that constitutes an imminent and serious risk to public health? 493.1775 (b)(1)	<input type="radio"/> Yes <input checked="" type="radio"/> No	

**Notes**

☐ Flag this section

Save & Continue

Save & Exit

Cancel

○ **Flag this Section**

This section works exactly the same for all Laboratory Survey Sections. (See [Flag this section](#), page 50)


○ **Notes**

This section works exactly the same for all Laboratory Survey Sections. (See [Notes](#), page 50)

Click **Save and Continue** to save the data and return to the [Laboratory Best Practices](#) page. Click **Save and Exit** to save the data and go to the [Review Laboratory Survey](#) page. Click **Cancel** at any time to cancel your changes and return to the [Review Laboratory Survey](#) page.

❖ **Laboratory Best Practices**

In the Laboratory Best Practices section, you can review answers to questions related to laboratory policies, procedures, and practices.



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**Laboratory Best Practices**

5) Do the testing personnel document the name of the test, lot number, and expiration date:		
5a) In the patients' charts?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
5b) Elsewhere in the laboratory?	<input type="radio"/> Yes <input type="radio"/> No	
5c) Are laboratory personnel given training when they are newly hired?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
5d) Are laboratory personnel evaluated to ensure that they can perform each test correctly before they are allowed to report patients' test results?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
5e) Are the testing personnel given training when new test kits or systems are introduced?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
5f) Are testing personnel shown how to identify inaccurate results and/or test system or device problems?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
5g) Does the laboratory staff have Internet access on-site?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
5h) If web-based training courses were available at the laboratory, would the testing personnel participate?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
5i) If off-site training courses were developed for waived laboratories, would the testing personnel attend?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
6) Does the laboratory:		
6a) Routinely review incoming package inserts for changes in the manufacturer's instructions?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
6b) Provide information or training based on the change? (Answer only if the previous question is YES)	<input checked="" type="radio"/> Yes <input type="radio"/> No	
6c) Has there been a change in (new) testing personnel within the last 12 months?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
7) Does the laboratory have a written policy or procedure for:		
7a) Checking patient identification?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
7b) Keeping the patient's test report in the patient's chart?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
8) Does the laboratory have a written policy or procedure to identify:		
8a) Instrument or device error codes?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
8b) Internal (procedural) quality control failure?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
8c) External (liquid) quality control failure?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A	
8d) Is the laboratory enrolled in voluntary proficiency testing?	<input checked="" type="radio"/> Yes <input type="radio"/> No	

**Notes**

☐ Flag this section

Save & Continue

Save & Exit

Cancel

○ **Flag this Section**

This section works exactly the same for all Laboratory Survey Sections. (See [Flag this section](#), page 50)

○ **Notes**


This section works exactly the same for all Laboratory Survey Sections. (See [Notes](#), page 50)

Click **Save and Continue** to save the data and return to the [Laboratory Personnel](#) page.  
 Click **Save and Exit** to save the data and go to the [Review Laboratory Survey](#) page. Click

**Cancel** at any time to cancel your changes and return to the [Review Laboratory Survey](#) page.

## ❖ Laboratory Personnel

In the Laboratory Personnel section, you can review answer to questions related to the Laboratory Director and testing personnel.

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Regional Office Approver

Administration  
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SSIS Support  
Email: COWPROJECT@cms.hhs.gov

Technical Support  
Email: SSISTechSupport@cdc.gov

Log Out

**Laboratory Personnel**

9) Testing Personnel  
(Select all that apply)

☒ Dentist  
☒ Physician (M.D., D.O.)  
☒ Podiatrist (D.P.M.)  
☒ Physician's Assistant  
☐ Registered Nurse (R.N.)  
☐ Nurse Practitioner  
☐ Licensed Practical Nurse (LPN)  
☐ Medical Technologist (B.S.)  
☐ Pharmacist  
☐ EMT  
☐ Medical Laboratory Technician - MLT (A.A.)  
☐ Medical Assistant  
☐ Military Training  
☐ High School Diploma  
☐ Other (please specify)

10) Laboratory Director  
(Select all that apply)



☐ Dentist  
☐ Physician (M.D., D.O.)  
☐ Podiatrist (D.P.M.)  
☐ Physician's Assistant  
☒ Registered Nurse (R.N.)  
☒ Nurse Practitioner  
☒ Licensed Practical Nurse (LPN)  
☒ Medical Technologist (B.S.)  
☐ Pharmacist  
☐ EMT  
☐ Medical Laboratory Technician - MLT (A.A.)  
☐ Medical Assistant  
☐ Military Training  
☐ High School Diploma  
☐ Other (please specify)

Comments

Notes

☐ Flag this section

Save & Continue Save & Exit Cancel



- **Flag this Section**

This section works exactly the same for all Laboratory Survey Sections. (See [Flag this section](#), page 50)

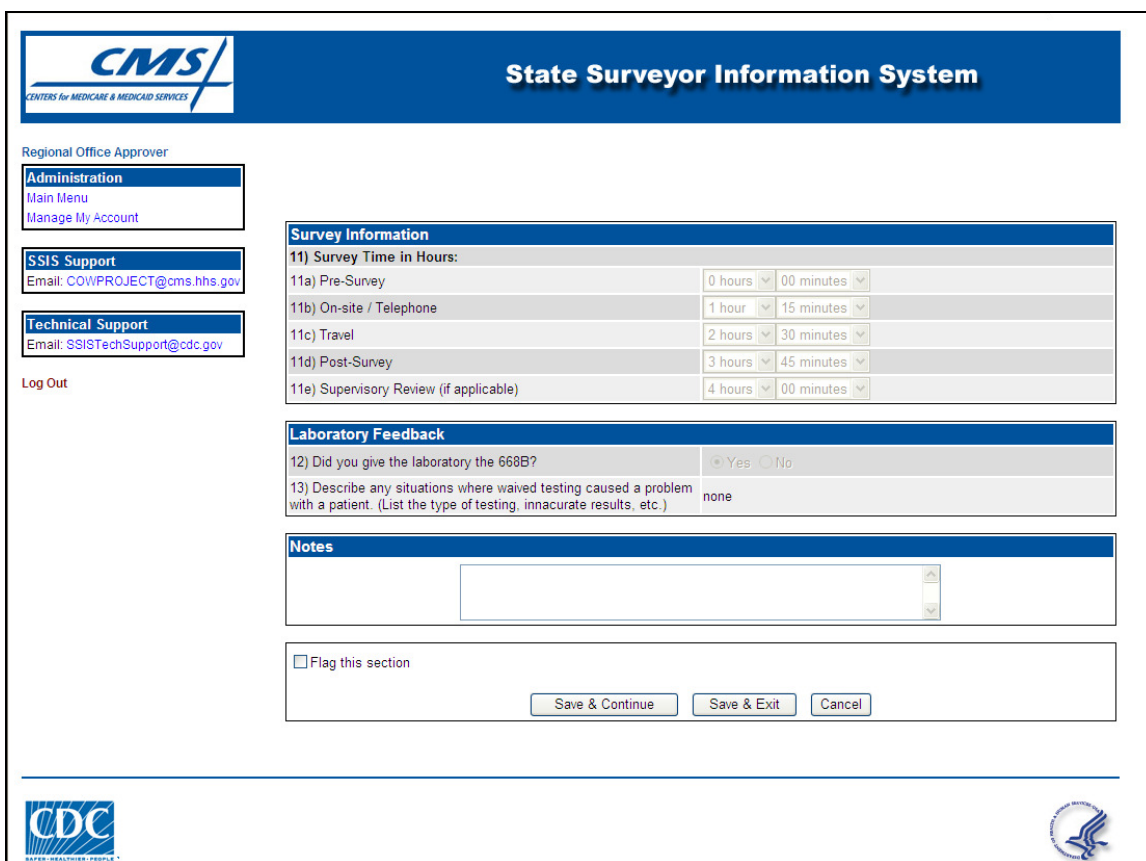
- **Notes**

This section works exactly the same for all Laboratory Survey Sections. (See [Notes](#), page 50)

Click **Save and Continue** to save the data and return to the [Survey Information](#) page. Click **Save and Exit** to save the data and go to the [Review Laboratory Survey](#) page. Click **Cancel** at any time to cancel your changes and return to the [Review Laboratory Survey](#) page.

## ❖ Survey Information

In the Survey Information section, you can review answers to questions related to the completion of a laboratory survey.



**CMS**  
CENTERS for MEDICARE & MEDICAID SERVICES

**State Surveyor Information System**

Regional Office Approver

**Administration**  
Main Menu  
Manage My Account

**SSIS Support**  
Email: COWPROJECT@cms.hhs.gov

**Technical Support**  
Email: SSISTechSupport@cdc.gov

Log Out

**Survey Information**

11) Survey Time in Hours:

11a) Pre-Survey	0 hours	00 minutes
11b) On-site / Telephone	1 hour	15 minutes
11c) Travel	2 hours	30 minutes
11d) Post-Survey	3 hours	45 minutes
11e) Supervisory Review (if applicable)	4 hours	00 minutes

**Laboratory Feedback**

12) Did you give the laboratory the 668B? ☒ Yes ☐ No

13) Describe any situations where waived testing caused a problem with a patient. (List the type of testing, inaccurate results, etc.) none

**Notes**

☐ Flag this section

Save & Continue Save & Exit Cancel

**CDC**  
SAFER • HEALTHIER • PEOPLE

- **Flag this Section**

This section works exactly the same for all Laboratory Survey Sections. (See [Flag this section](#), page 50)

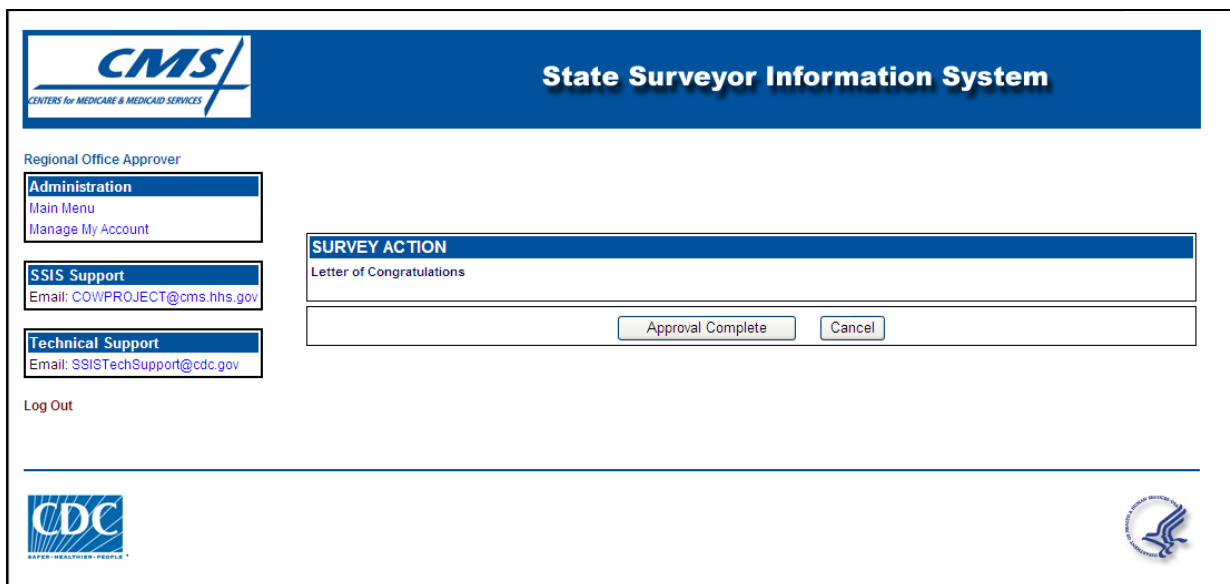
- **Notes**

This section works exactly the same for all Laboratory Survey Sections. (See [Notes](#), page 50)

Click **Save and Continue** to save the data and return to the [Survey Action](#) page. Click **Save and Exit** to save the data and go to the [Review Laboratory Survey](#) page. Click **Cancel** at any time to cancel your changes and return to the [Review Laboratory Survey](#) page.

## ❖ Survey Action

In the Survey Action section, you can view the survey action(s) for the laboratory based on the answers entered by the State Surveyor or Data Entry user.



You can take the following actions on a record: either approve a record by assigning the "Complete Approval" status; or send the record back to the State Surveyor for revision.



### NOTES:

- If you have not flagged a survey section (i.e. you have not selected the **Flag this Section** option), you will have an **Approval Complete** and **Cancel** option.
- If you have flagged one or more survey sections by selecting the **Flag this Section** option on a survey section page, you will have a **Return to State Surveyor for Revisions** and **Cancel** option.

Click **Approval Complete** to approve the laboratory survey. Click **Return to State Surveyor for Revision** to send the laboratory survey back to the State Surveyor for revision. Click **Cancel** at any time to cancel your changes and return to the [Review Laboratory Survey](#) page.



**NOTE:** If the **Return to State Surveyor for Revisions** option is selected, the State Surveyor associated with the survey will be automatically notified via email. (See [Surveys Needing Revision](#))




## ❖ Review Laboratory Survey Page

To review laboratory survey data, click **View** located in the section you would like to review.



### NOTES:

- The survey is divided into the following data entry sections: Laboratory Demographics, Regulations, Laboratory Best Practices, Laboratory Personnel, Survey Information, and Survey Action
- You can only view data in the survey sections in the following chronological order: Laboratory Demographics, Regulations, Laboratory Best Practices, Laboratory Personnel, and Survey Information **OR** you can only view data in a survey section if the preceding survey section has been viewed.

**State Surveyor Information System**

Regional Office Approver

**Administration**  
[Main Menu](#)  
[Manage My Account](#)

**SSIS Support**  
Email: [COWPROJECT@cms.hhs.gov](mailto:COWPROJECT@cms.hhs.gov)

**Technical Support**  
Email: [SSISTechSupport@cdc.gov](mailto:SSISTechSupport@cdc.gov)

[Log Out](#)

### Review Laboratory Survey

**Laboratory Demographics** [Collapse](#) [View](#)

CLIA Number:	05D1019306
Laboratory Name:	PAGIEL SHECHTER MD INC
Laboratory Address:	5901 W OLYMPIC BLVD SUITE 305 LOS ANGELES, CA 90036
Laboratory Phone Number:	(323) 585-5068
Type of Facility:	PHYSICIAN OFFICE
Estimated Annual Test Volume:	2000
State Laboratory Licensure Program:	Y
Certificate of Waiver (CW) Date:	11/17/2007
Demographic Change in:	
Enter known changes:	
Estimated population base:	Urban
Number of Different Tests:	100

**Regulations** [Expand](#) [View](#)



**Laboratory Best Practices** [Expand](#) [View](#)

**Laboratory Personnel** [Expand](#) [View](#)

**Survey Information** [Expand](#) [View](#)

**Survey Action** [Expand](#) [View](#)

[Cancel](#)





**NOTES:**

- If you have not flagged a survey section (i.e. you have not selected the **Flag this Section** option), you will have an **Approval Complete** and **Cancel** option.
- If you have flagged one or more survey sections by selecting the **Flag this Section** option on a survey section page, you will have a **Return to State Surveyor for Revisions** and **Cancel** option.

Click **Approval Complete** to approve the laboratory survey. Click **Return to State Surveyor for Revision** to send the laboratory survey back to the State Surveyor for revision. Click **Cancel** at any time to cancel your changes and return to the [Review Laboratory Survey](#) page.



**NOTE:** If the Return to State Surveyor for Revisions option is selected, the State Surveyor associated with the survey will be automatically notified via email. (See [Surveys Needing Revision](#))

# Reports

The Reports section of SSIS 2.0 allows you to generate static, real-time reports by region and/or state.



**IMPORTANT:** Data reported only includes laboratory survey records that have been approved by a Regional Office Approver.

You can view a report by clicking the name of the report located on the [Main Menu](#) page. There are 4 reports available which summarize the SSIS data by region and/or state.



**NOTES:**

- If you are a state user, the results are restricted to your state only.
- If you are a regional user, you can filter the report by state or view the report for the entire region.
- For reports that have filter criteria, if no criteria are selected, then the report will return unfiltered results.

## Reports Available:

### ❖ Completed Survey Count Report

#### **User Rights:**

The following user roles can view the **Completed Survey Count Report**: *CDC Administrator, CMS Lead, CDC Report User, CMS Report User, Regional Office Approver, Regional Read Only, State Supervisor, State Read Only, State Surveyor, and Data Entry User*

You can filter this report by survey date range, region, and/or state.

Based on filtered criteria, the report displays the initial survey count, follow up survey count, grand total of the initial survey count, and grand total of the follow up survey count by state. The report is ordered alphabetically by state and has sortable columns.

### ❖ Survey Action Report

#### **User Rights:**

The following user roles can view the **Survey Action Report**: *CDC Administrator, CMS Lead, CDC Report User, CMS Report User, Regional Office Approver, Regional Read Only, State Supervisor, State Read Only, State Surveyor, and Data Entry User*

You can filter this report by survey date range, region, and/or state.

Based on filtered criteria, the report displays the survey action count, and the grand total of survey actions by survey action. The report is ordered by survey action and has sortable columns.

### ❖ Survey Response Report

#### **User Rights:**

The following user roles can view the **Survey Response Report**: *CDC Administrator, CMS Lead, CDC Report User, CMS Report User, Regional Office Approver, Regional Read Only, State Supervisor, State Read Only, State Surveyor, and Data Entry User*

You can filter this report by survey date range, region, state, and/or survey section.

Based on filtered criteria, the report displays the initial survey count and percent, follow up survey count and percent by survey response. The report displays the laboratory survey questions in the same order they appear on the paper laboratory survey questionnaire and has no sortable columns.



#### **NOTES:**

- Survey questions that have answers that were entered in a text box are **NOT** included on this report.
- The follow up survey count and percent will **ONLY** appear for the Regulations survey section

## ❖ Surveyor Hours Report

**User Rights:**

The following user roles can view the **Surveyor Hours Report**: *CDC Administrator, CMS Lead, and CMS Report User*

You can filter this report by survey date range and/or state.

Based on filtered criteria, the report displays the sum of hours and grand total of hours by survey time segments. The columns are sortable.

# CLIA Laboratory Demographics

You can view laboratory demographics data associated with a specified laboratory.

## User Rights:

The following user roles can view the **View Laboratory Demographics**: *CDC Administrator, CDC Report User, CMS Lead, CMS Report User, Regional Office Approver, Regional Read Only, State Supervisor, State Read Only, State Surveyor, and Data Entry User*

To view Laboratory Demographics, from the [Main Menu](#) page, under the Laboratory Demographics section header, click **View Laboratory Demographics**, and the system will display the [Clinical Laboratory Improvement Amendments \(CLIA\) Laboratory Demographics](#) website in a separate internet browser window.

The screenshot shows the CDC website's 'Clinical Laboratory Improvement Amendments (CLIA) - Laboratory Demographics' page. The page has a blue header with the CDC logo and navigation links. A left sidebar contains a 'CLIA Content' menu with links to CLIA, Chronology, Complexities, Demographics, CLIA Law, and Regulations, as well as a 'Related Content' menu with links to DLS Home, Genetics, International, IOLM, MASTER, MPEP, NLTJ, Publications, and Training. The main content area is titled 'Clinical Laboratory Improvement Amendments (CLIA) - Laboratory Demographics' and includes a description of the data source, a 'Create a custom file from the CLIA OSCAR database\*' section, and a 'Choose a format (required):' section with radio buttons for 'Excel' (selected) and 'Comma Separated Values'. Below these are four selection boxes: 'States' (listing all states and territories), 'Lab Type' (listing various laboratory types), 'Zip codes' (empty), and 'Certificate types' (listing accreditation and compliance types). A 'Go!' button is at the bottom of the selection area. The page also includes a 'Notes' section with bullet points about data updates, file formats, and download times, and a footer with contact information and logos for the Department of Health and Human Services and USA.gov.

Home | About CDC | Press Room | Funding | A-Z Index | Centers, Institute & Offices | Training & Employment | Contact Us

**CDC** Department of Health and Human Services  
Centers for Disease Control and Prevention

Enter Search Term

Health & Safety Topics | Publications & Products | Data & Statistics | Conferences & Events

**CLIA Content**

- CLIA
- Chronology
- Complexities
- Demographics
- CLIA Law
- Regulations

**Related Content**

- DLS Home
- Genetics
- International
- IOLM
- MASTER
- MPEP
- NLTJ
- Publications
- Training

**Clinical Laboratory Improvement Amendments (CLIA) - Laboratory Demographics**

This CLIA laboratory demographics file is populated with data queried from the [Centers for Medicare & Medicaid Services \(CMS\)](#) CLIA OSCAR database. Laboratories that would like to update their information in the CMS database should contact their [State Survey Agency](#).

Create a custom file from the CLIA OSCAR database\*

Choose a format (required):

☒ Excel

☐ Comma Separated Values

Choose state(s) and/or laboratory type(s) (optional) and/or Zip code(s) (optional) and/or Certificate type(s) (optional). Use 'Ctrl' key and left mouse click to select/unselect multiple states or lab types.

**States**

All States  
ALASKA  
ALABAMA  
ARKANSAS  
AMERICAN SAMOA  
ARIZONA  
CALIFORNIA  
CANADA  
COLORADO  
CONNECTICUT  
DISTRICT OF COLUMBIA  
DELAWARE

-AND/OR-

**Lab Type**

All  
AMBULANCE  
AMBULATORY SURGERY CENTER  
ANCILLARY TEST SITE  
ASSISTED LIVING FACILITY  
BLOOD BANKS  
COMMUNITY CLINIC  
COMPREHENSIVE OUTPATIENT REHAB  
END STAGE RENAL DISEASE DIALYSIS  
FEDERALLY QUALIFIED HEALTH CENTER  
HEALTH FAIR  
HEALTH Health Maint Organization

**Zip codes**

-AND/OR-

**Certificate types**

All  
ACCREDITATION  
CERTIFICATE of COMPLIANCE  
MICROSCOPY  
WAIVER

For other data requests of CMS data, please contact the Research Data Assistance Center (ResDAC) at the University of Minnesota (<http://www.resdac.umn.edu>).

\*Notes:

- Data are updated from the CMS OSCAR data weekly.
- All downloaded files are compressed in the 'zip' format. You will need a decompression tool such as 'WinZip' to uncompress the file.
- If you do not choose one or more states and/or laboratory types, the default selection will be 'All'. Using this setting will result in large file sizes:
- Excel ~ 9mb zipped, 100mb unzipped
  - Comma Delimited ~ 6mb zipped, 29mb unzipped
- When downloading large files, please be patient. It can take up to a minute for the download dialog to appear on your screen.

This page last reviewed: 7/8/2008

Home | Policies and Regulations | Disclaimer | e-Government | FOIA | Contact Us

**SAFER • HEALTHIER • PEOPLE™**  
Centers for Disease Control and Prevention, 1600 Clifton Rd, Atlanta, GA 30333, U.S.A.  
Tel: (404) 639-3311 / Public Inquiries: (404) 639-3034 / (800) 311-3435

**USA.gov**  
Department of Health and Human Services

When all the information has been entered, return to the SSIS system to proceed.

# Resources

The Resources section of SSIS 2.0 allows you to access various documents related to the State Surveyor program.

- [Survey Questionnaire](#) – Allows system users to access the laboratory survey questionnaire.
- [User Manual](#) – Allows system users to access the SSIS 2.0 user manual.
- [Crosswalk](#) – Allows system users to access a document that shows the new question numbers for the Survey Questionnaire.
- [Model Letter to use when No Problems are Identified](#) – Allows system users to access a model letter that can be used when the survey action for a completed laboratory survey is Letter of Congratulations.
- [Model Letter to use for Problems Requiring Corrections](#)– Allows system users to access a model letter that can be used when the survey action for a completed laboratory survey is Letter of Required Corrections.
- [Model Letter to use for Suggestions Only](#)– Allows system users to access a model letter that can be used when the survey action for a completed laboratory survey is Letter of Suggestions.
- [Model Letter to use for Required Corrections AND Suggestions Offered](#)– Allows system users to access a model letter that can be used when the survey action for a completed laboratory survey is Letter of Required Corrections AND Letter of Suggestions.

## Appendix A: Record Statuses

A record can fall under one of the following statuses:

- **In Process** – A laboratory survey record entered by a State Surveyor or Data Entry user that is in the process of being completed, updated, and otherwise prepared for review..
- **Ready for Regional Office Approver Review** – A laboratory survey record that has been submitted by a State Surveyor or Data Entry user and is ready for the Regional Office Approver to review.
- **Completed Approval** – A laboratory survey record that was submitted by a State Surveyor or Data Entry user and has been approved by a Regional Office Approver. The record is finalized and can only be viewed in Read-Only mode.
- **Flagged** – A laboratory survey record that has been sent from a Regional Office Approver back to a State Surveyor for modification and/or corrections.
- **Deleted Complete** – A laboratory survey record that has been deleted after having been approved by a Regional Office Approver.
- **Deleted Incomplete** – A laboratory survey record that has been deleted before receiving approval from a Regional Office Approver.



## Appendix B: User Permissions

System Access	CDC Admin	CMS Lead	CDC Report User (Read Only)	CMS Report User (Read Only)	Regional Office Approver	State Supervisor	State Surveyor (SS)/ Data Entry	Regional Read Only	State Read Only
Authenticate User		Required for 1st access to system	N/A	Required for 1st access to system	Required for 1st access to system	Required for 1st access to system	Required for 1st access to system	Required for 1st access to system	Required for 1st access to system
Log In/Out	via CDC Intranet	via Internet	CDC Intranet	via Internet	via Internet	via Internet	via Internet	via Internet	via Internet
Reset Forgotten Password	N/A	U		U	U	U	U	U	U
Administrative Functions	CDC Admin	CMS Lead	CDC Report User (Read Only)	CMS Report User (Read Only)	Regional Office Approver	State Supervisor	State Surveyor/ Data Entry	Regional Read Only	State Read Only
Manage My Account		U		U	U	U	U	U	U
Manage Users	A, U - specified user roles	A, U - specified user roles							
Manage Domains	A, U, D								
Surveys	CDC Admin	CMS Lead	CDC Report User (Read Only)	CMS Report User (Read Only)	Regional Office Approver	State Supervisor	State Surveyor/ Data Entry	Regional Read Only	State Read Only
View Laboratory Demographics	R - all data	R - all data	R - all data	R - all data	R - all data	R - all data	R - all data	R - all data	R - all data
Add/Edit Laboratory Survey							A - new survey, follow up survey U - surveys they are associated with that are in process and/or need revision		
Approve Survey					Approve OR Return to State Surveyor		N/A		
Inactivate Laboratory Survey	D- any status						D - surveys they are associated with the following statuses: - In Process - Flagged - Completed Approval		
Search & Locate Survey	R - any survey	R - any survey			R - region specific	R - state specific	R - surveys they are associated with		
Open/Close Laboratory Survey Data Entry	U	U							

Reports	CDC Admin	CMS Lead	CDC Report User (Read Only)	CMS Report User (Read Only)	Regional Office Approver	State Supervisor	State Surveyor/ Data Entry	Regional Read Only	State Read Only
Completed Survey Count	R - all data	R - all data	R - all data	R - all data	R - region specific	R - state specific	R - state specific	R - region specific	R - state specific
Survey Actions	R - all data	R - all data	R - all data	R - all data	R - region specific	R - state specific	R - state specific	R - region specific	R - state specific
Survey Responses	R - all data	R - all data	R - all data	R - all data	R - region specific	R - state specific	R - state specific	R - region specific	R - state specific
Surveyor Hours	R - all data	R - all data		R - all data					
View Resources/ Documents	R - all data	R - all data	R - all data	R - all data	R - all data	R - all data	R - all data	R - all data	R - all data

**A** = Add      **D** = Delete (i.e. inactivate)      **U** = Update      **R** = Read Only      **N/A** = Not Available

## Appendix C: Acronym Definitions

**CDC** - Centers for Disease Control and Prevention - [www.cdc.gov](http://www.cdc.gov)

**CLIA** - Clinical Laboratory Improvement Amendments - [wwwn.cdc.gov/clia](http://wwwn.cdc.gov/clia)

**CMS** – Centers for Medicare and Medicaid Services – [www.cms.gov](http://www.cms.gov)

**DHHS** – Department of Health and Human Services – [www.dhhs.gov](http://www.dhhs.gov)

**SSIS** – State Surveyor Information System (SSIS) (see [State Surveyor Information System](#)), page 4)

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		Add User .....
		Deactivate User .....
		View User .....
		<b>P</b>
		Password .....
		Temporary Password .....
		Patient List .....
		Percent of Syndrome by Sex and Country (Approved by CDC) .....
		<b>R</b>
		Record Statuses .....
		Reports .....
		Percent of Syndrome by Sex and Country (Approved by CDC) .....
		Review Notes .....
		<b>U</b>
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		Activate User .....
		Add User .....
		Deactivate User .....
		New User .....
		Returning User .....
		View User .....
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		User .....